

## **CLEVELAND METROPOLITAN SCHOOL DISTRICT**

# SUPPLIER SELF SERVICE GUIDE

CMSD PROCUREMENT/PURCHASING DEPARTMENT



JULY 2018







### Supplier Self Service Portal Overview

The CMSD Supplier Self Service Portal is a free internet accessible Workday enabled self-service tool that allows suppliers to directly access their information during the "procure-to-pay" lifecycle. The portal is available to all CMSD approved suppliers who are registered to use the service.

#### The Supplier Self Service portal offers the ability to:

- Self-register through an external website
- Receive newly issued purchase orders
- View purchase orders
- Access payment and remittance advice information
- Maintain master data such as contact information, addresses, and bank accounts.
- Create invoices (coming soon)
- Upload catalogs (coming soon)

In addition to the benefits above, the portal is available 24/7 and provides real-time access to invoice and purchase order information.

## Effective, August 2018, CMSD will require all approved Suppliers to register and use the Supplier Self Service portal to conduct business with CMSD.

If you are approved and registered, you should have received your login credentials. If you are registered and have not received your login credentials, please contact us at <u>SupplierSelfService@clevelandmetroschools.org</u>.

To get answers to our most frequently asked questions (FAQs) and review our Supplier Self Service Fact Sheet, visit our Supplier Self Service web page at <a href="http://clevelandmetroschools.org/Domain/120">http://clevelandmetroschools.org/Domain/120</a>. Select Supplier Self Service from the menu on the left.



### Contents

Supplier Self Service Portal Overview1
Supplier Self Service Web Site
Website address: http://clevelandmetroschools.org/Page/134144
Supplier Self Service Portal Login Page
Supplier Self Service Portal Home Page
Bookmark a Webpage6
Self Service Portal Tools
Inbox Application9
Actions Tab11
Task Actions12
Archive Tab13
Notifications14
Contact and Banking Application15
Change17
Task Actions for Change Request:17
Change Contact Information18
Address19
Email20
Instant Messenger21
Web Address22
Change Settlement Bank Accounts22
Settlement Account Information23
Settlement Account Details24
Change Alternate Names25
Manage Attachments26
View
Contact Information28
Settlement Bank Accounts
Alternate Names



Invoices and Payments Application
Invoices and Payments
Most Recent Payments
Most Recent Invoices
Find Purchase Orders
POs and Catalogs Application40
Most Recent Purchase Orders41
Uninvoiced POs44
View Details45
Export to Excel46
Export to PDF47
Purchase Orders49
Search by Date Range
Search by Purchase Order52
Search by Purchase Order Number Only53
Search for a Specific PO within a Specific Date Range53
Search by Date Range Only55
Training Notes



## Supplier Self Service Web Site

Website address: <u>http://clevelandmetroschools.org/Page/13414</u>

PROCUREMENT / PURCHASING	Welcome to the Cleveland Metropolitan School District (CMSD) Supplier Self Service Web Page.				
Procurement / Purchasing	The Supplier Self-Service portal creates a higher level of connectivity for an integrated flow of information between CMSD and our Suppliers.				
Bid Process					
Supplier Self Service	Cleveland Metropolition Scheel District (MSD) CMSD Supplier Sch Survices Pertal Supplier				
	This secure self-service tool offers you the ability to:         • Self-register through an external website.         • View purchase orders.         • Access payment and remittance advice information.         • Maintain master data such as contact information, addresses, and bank accounts.         • Create invoices (coming soon).         • Upload catalogs (coming soon).				
	START HERE				
	Existing Supplier Only New Supplier Only				
	Update Contact Information Register as a New Supplier (Coming Soon)				



## Supplier Self Service Portal Login Page

You may access the Self Service Portal using the link in the email from CMSD.



## Supplier Self Service Portal Home Page

Q Search		¢ 🔮 🥥
	Welcome, S-004706 / test test	
	Anouncements   2 durins     Supplier Self-Service Web page   Control Inform you larging or dealing to be reduceded to the dealers   Control Inform   Supplier FAQ Link   Control Inform   Supplier FAQ Link   Control Inform   Supplier FAQ Link   Control Inform   Data below from you larging or dealing to traver the Supplier from   Supplier FAQ Link   Control Inform   Table	
	E 2015 Biologica E 2015 Biologica and Jugor assessed - Samon Share, Yang Janaka, Samon Share, Yang Janaka, Yang Janaka, Samon Share, Samon Share, Samon samong an Andrae, Anis, Samon Andrae, Ying Yang, Yang Janaka, Yang Janaka, Yang Janaka, Samon samong and Andrae Janaka. Samon Shareka and Janaka Shareka and Shareka Shareka. Samong Shareka, Samong Shareka Sharek	



## Bookmark a Webpage

Follow the steps below to bookmark the Supplier Self Service webpage and the CMSD Supplier Portal login page.

INSTRUCTIONS
NOTE: To bookmark a webpage, make sure you are on the open webpage
• Click in the upper right corner of the screen. Scroll down and click <b>Bookmarks</b>
<ul> <li>Click Bookmark this page to display the Edit Bookmark box (see below)</li> </ul>
Edit bookmark
Name Procurement / Purchasing / Supplier Self S
Folder Bookmarks bar +
Mane Door Remove
To get your bookmarks on all your devices. sign in to Chrome
<ul> <li>Type the name of the webpage you want to bookmark next to name</li> </ul>
• Click the ▼ on the right of Folder and click Bookmark Bar or select a folder you've created
<ul> <li>If you chose Bookmark Bar, the bookmarked page will appear on the same row as</li> <li>Apps or in your designated folder.</li> </ul>
<ul> <li>If you have many items on your Bookmark Bar, you may need to scroll right using the</li> <li>in the top right of the screen.</li> </ul>



## Self Service Portal Tools

Q Search	Perform document search
Ç	Notifications to take action
\$\$	Configure the page you're viewing or refresh information
	Filter information on the report
	Select Column preference for report
000	Create/expand/collapse chart
	Displays additional actions/details
	Scroll left or right
<b>•</b>	Scroll up or down
	Inbox



Ŵ	Return to the homepage
0	Preference menu/sign out option
."	Return toggle to normal view
<b>*</b>	Toggle to full screen view
<b>e</b>	Print document
	Export to Excel
<b>†</b>   <b>†</b>	Configure/view chart
:=	Search menu options
Submit	Accept the transaction or entry and proceed to the next step
Save for Later	Save the current entries to allow updates later
Cancel	Cancel the transaction or entry



## **Inbox Application**

Purpose:	The purpose of this Application is to enable suppliers to receive Workday messages, actions items and view archived transactions that have been completed within the Inbox.
How to Access:	The inbox can be accessed from the Workday homepage.
Audience:	CMSD Approved Suppliers
Helpful Hints:	You will need to be registered as a CMSD Supplier and have access credentials in order to log in to the Supplier Portal.
Procedure:	Complete the following steps to understand the use of the Inbox application and the different Dashboards.

The homepage offers three ways to access the inbox.

- 1. On the bottom of the left side of the screen. Messages can be accessed by clicking Go to Inbox
- 2. On the right side of the screen under Applications.
- 3. On the top right side of the screen  $\textcircled{\begin{tmatrix} \hline \end{tmatrix}}$  .

These options are shown on the next page.

Welcome \$-001706 / test test		
<ul> <li>✓ Items</li> <li>✓ Items</li> <li>✓ Supplier Self Serie Web page Coals beine from your laptic and called to be networked to the - network states</li> <li>✓ Supplier FAQ Link Coals beine from your laptic por dealings to renewe the Supplier F.</li> <li>✓ Supplier FAQ Link</li> </ul>		
these     these     these     these     these     the second these the provided by set text on 67/02/2018     second by: Second By set text on 67/02/2018     the second by text on 57/02/2018		
EVEN     EVEN		



The inbox on the left side of the screen will show the 3 most current messages. These messages are designed to alert you that action is needed on pending transactions. See below.



Click Go to Inbox to review pending items. As shown in the next illustration, Action and Archive items will be displayed. To view the details, click the Action or Archive tab.

Q Search		P		<
Inbox				
Actions (1) Archive	Revise Supplier Contact Information Change	8	☆ ⊚	<i>c</i>
Viewing: All v Sont By: Newest v	6 minute(s) ago - Due 66/24/2018			
Contact Information Change for Quality Ribbons & Supplies Co created by Test Test on 06/22/2018 Sent Back by Ergar: Neves 6 minute(s) ago - Due 06/24/2018	All contact changes will be pending until approved by CMSD Supplier Administrator.			
	Pending Contact Information Change Contact Information Change for Quality Ribbons & Supplies Co created by Test Test on 06/22/2018 Statue Draft Contact Information Attachments			
	Phone			
	Country Phone Code * X United States of America			
	Phone Number • (216) 579 6201			



Once the Inbox page is open you will see 2 tabs:

ŵ	Q Search		
Inbox			
Actions (1)		Archive	
	Actions (1)	Archive	

Tab	Description
Actions	Displays incomplete business process tasks, approvals, and To Dos in chronological order.
Archive	Displays business process tasks and actions completed. The system default displays tasks and actions for the last 30 days. To see additional items, follow the steps listed under Archive Tab on page 13.

#### Actions Tab

Once there is pending action you are now ready to review what action is required. In the next example we see that a previous change request has been sent back in the red box.

Contact Information Change for Quality Ribbons & Supplies Co created by Test Test on 06/22/2018		
Sent Back by Elyzer Nieves	W	
25 minute(s) ago - Due 06/24/2018		

On the right side scroll down the page to review the comments from the Approver. These comments will identify actions you will need to take.



Viewing: All 🤍 Sort By: Newest 🗸 🗸		
Contact Information Change for Quality Ribbons & Supplies Co created by Test Test on 06/22/2018 Sent Back by Dyzer Nieves 25 minute(a) ago - Due 06/24/2018	Web Address	
	enter your comment	
	enter your comment View Comments (1)	

#### **Task Actions**

Task Actions	Description
Save for Later	If the icon Save for Later is selected, it will save the changes and they can be picked up at a later time to complete all the pending edits and submit for approval at a later time.
Cancel	If the icon Cancel is selected, you will go back to the menu screen without saving any data.
Submit	If the icon Submit is selected, it will trigger the actual changes for the Supplier Administrator to review, update, approve or cancel the corresponding change request.
Done	Once a process has been submitted you can press Done to go back to the Inbox.



Success! Event submitted Contact Information Change for Quality Ribbons & Supplies Co created by Test Test on 06/22/2018 (Actions)		
25 minute(s) ag	jo - Due 06/24/2018	
Up Next Supplier Admi Approval by Supp Due Date 06/24/	inistrator Change Supplier Contact lier Administrator /2018	ct Information
Details	s and Process	
For	Quality Ribbons & Supplies Co.	
Overall Process	Contact Information Change for Quality Ribbons & Supplies Co created by Test Test on 06/22/2018	
Overall Status	In Progress	
Due Date	06/24/2018	
Dotaile	Process	
Done Contact Inform	mation Change Event Contact Information Change for Quality Ribbons & Supplies Co created by Test Test C	



Once you have taken action on any messages, your Inbox Application will clear out showing that you don't have any pending actions. You have the option to see all transactions on the Archive Tab (details below).

**Helpful Hint:** Submitting a transaction will come back with the final status from the approver that could be: Denied, Sent Back for update or Approved.

#### Archive Tab

On the Archive Tab below you will see the review history of all the actions that have been taken within your Inbox.

The Archive tab displays completed action items for 30 days from the initiated request date. To view archived items older than 30 days, perform the following steps: Click the down arrow and select "View More Processes". When the "View More Processes" screen is displayed, enter the "Start Date" and "End Date", and then click OK.



a a	Search			P	Ð	0
Inbox	x					
Ac	ctions (0)	Archive	View Event	l	1 Ø	c <sup>7</sup>
Sort By: N	Newest	y y	Contact Information Change for Quality Ribbons & Supplies Co created by Test Test on 06/22/2018 Access			
Contact Inf Supplies Co 13 minute(:	From Last 30 formation Change for Co created by Test T (s) ago - In Progress: 1	Days Cquality Ribbons & Fest on 06/22/2018 Multiple Parties	13 minute(s) ago - In Progress: Multiple Parties For Quality Ribbons & Supplies Co. Overall Process Contact Information Change for Quality Ribbons & Supplies Co created by Test Test on 06/22/2018			
Alternate N Supplies Co	Name Change for Qua Co created by Test T	ality Ribbons &	Overall Status In Progress			
4 day(s) ag	go - Successfully Com	npleted	Due Date 06/24/2018			
Settlement Supplies Cr 4 day(s) ag	t Account Change for Co created by Test T go - Successfully Com	Ouality Ribbons & fest on 06/18/2018	Calendars In Use Consecutive Days (No Calendars Selected)			
Supplier Inv 06/11/2010	nvoice: Quality Ribbon 18 for \$14.37	ss & Supplies Co. on	Details Process			
7 day(s) ag	go - In Progress: Multi	iple Parties	Contact Information Change Event Contact Information Change for Quality Ribbons & Supplies Co created by Test Test on 06/22/2018			

#### Notifications

Notifications are used to keep you informed of activity related to your account. These are typically items that you need to know about but don't require action. In the example below, the

**Notifications** icon was selected. Unread notifications will have a circle next to them. The circle will disappear once the notification is selected.





## **Contact and Banking Application**

Purpose:	The purpose of this Application is to enable suppliers to maintain or view their supplier data, such as addresses and settlement banking information, and to submit their own updates.
How to Access:	Go to the CMSD supplier portal home page, select the <b>Contact and</b> <b>Banking</b> icon under the <b>Applications</b> section.
Audience:	CMSD Approved Suppliers
Helpful Hints:	You will need to be registered as a supplier contact and need to have access credentials in order to log in to the Supplier Portal.
Procedure:	Complete the following steps to understand the use of the Application and the different Dashboards.

Once you log in to the supplier portal you will see the next home page where you will be able to apply different actions by selecting specific Applications like: Inbox, Contact and Banking, Invoices and Payments, and PO's and Catalogs.

Q Search		¢	9 🔿
	Welcome, S-004706 / test test 💿		
	Anoncentents   Arrow   Arrow		
	E 2010 Monton, Son Angeles annual. E 2010 Monton, Son Angeles annual. Septembra Tudor Lindo Tudor and E and and the for a manuar of a 11 bots and and an an 100 Monton. A son and manuar and manual and and an and an and and an and and an		



#### **Contact and Banking Application**



To access the Contact and Banking application click the Banking icon. Once selected a new dashboard page will open.

Q Search			¢ 🖻 🧲
← Contact and Banking			۵
	Change	View	
	Change Contact Information	Contact Information	
	Change Settlement Bank Accounts	Settlement Bank Accounts	
	Change Alternate Names	Alternate Names	
	Manage Attachments		

The dashboard is divided into two sections:

**Change** will allow you to maintain and update your company information. An internal approval process will be triggered if you initiate and submit a change of information.

Task	Description
Change Supplier Contact Information	Submit new and updated supplier contact information for review and approval.
Change Supplier Settlement Bank Account	Submit new, and updated supplier settlement bank accounts for review and approval.
Change Supplier Alternate Name	Submit new and updated supplier alternate names for review and approval.



Manage Attachments Upl pro	oad multiple type of files related to the information vided.
-------------------------------	--

The second option **View** will just allow the supplier contact user to see the existing data on "view mode".

### Change

#### *Task Actions for Change Request:*

Below you will find the list of task actions possible and a brief description on what each action will trigger within a change request.

Task Actions	Description
ок	Before any change can be made a confirmation message will pop up and will need to be confirmed to start the draft Change by selecting the OK icon.
Delete	If the Delete box is checked, the existing record type where selected will be deleted once the transaction is fully approved once submitted.
Add	If the Icon Add is selected, it will open up a new section based on the selection type to include a new record to the supplier data.
Remove	If the Icon Remove is selected, it will remove the record you just inserted by selecting the Add action above.
Save for Later	If the Icon Save for Later is selected, it will save the changes and they can be picked up at a later time to complete all the pending edits and submit for approval at a later time.



Cancel	If the Icon Cancel is selected, it will just take you back to the menu screen without saving any data.
Submit	If the Icon Submit is selected, i <u>t</u> will trigger the actual changes for the Supplier Administrator to review, update, approve or cancel the corresponding change request.

## Change Contact Information

Select the icon	Change Contact Information	below you will find what information can be updated
with this task.		



Phone			
Delete			
Country Phone Code	*	× United States of America (+1)	≔
Phone Number	*	(216) 579-6201	
Phone Extension			
Phone Device	*	Landline	•
Туре	*	Business	
Primary		<ul> <li>✓</li> </ul>	
Use For		× Billing	≔
Visibility		Public	
Comments		TST 01	

Field	Required/Optional
Country Phone Code	Required
Phone Number	Required
Phone Extension	Optional



Phone Device	Required
Туре	Business (Default)
Primary	At least one must be Primary
Use For	Billing Remit To <mark>(See helpful hint below)</mark> Shipping
Visibility	Required
Comments	Optional

Address			
Delete			
Effective Date	•	01/01/1980 🖻	
Country	ĺ	× United States of America	=
Address Line 1	*	2769 Commercial Rd	
Address Line 2			
City	*	Cleveland	
State	•	× Ohio	1
Postal Code	*	44113	
County			
Usage			
Type *	But	iness	
Primary			
Use For	××	Mailing 📃	
Visibility	1	Public	

**Helpful Hint:** Please DO NOT remove old addresses. CMSD has opted to retain all account history. If your address has changed, please **Add** the new address with a new effective date.



Field	Required/Optional
Effective Date	Required
Country	Required
Address Line 1	Required
Address Line 2	Optional
City	Required
State	Required
Postal Code	Required
County	Optional
Туре	Business (Default)
Primary	At least one must be Primary we suggest selecting the most effective dated one.
Use For	Select one or all that apply
Visibility	Required
Comments	Optional

Delete	Deter   Email Address   Mutationsd2@pmail.com  Type  Business  Primary  Kalling  Kal					
Enal Addess * wd testonad2@gmail.com Type * Business Permary  Vee Per X Billing  X Benit To X Shipping Visibility  Public Comments	Email Address     wd testcowd2@gmail.com       Type     Business       Primary     Image: Common					
Type ★ Business Primary   Use For   X Brinit To  X Shoping  Visibility   Public  Convents	Type <ul> <li>Business</li> <li>Primary</li> <li>Image: Second Seco</li></ul>	dress *	wd.testcmsd2@gmail.com			
Prinary  Use For  X Billing  X Remit To X Shopping Visibility  Public Comments	Primary  Use For  X Billing  X Remit To  X Shipping Visibility  Puble Comments	*	Business			
Use For × Isiling ::	Use For X Billing E X Renit To X Shipping Viubility Z Public Comments					
X Remit To X Shipping Visibility ✓ Public Comments	X Renit To X Shipping Viubility		× Billing	100		
X Shipping Visibility	Viubility Zholic Comments		× Remit To			
Visibility Vibilic	Visibiliy Z Public		× Shipping			
Comments	Comments		Public Public			
		ts				



Field	Required/Optional
Email Address	Required
Туре	Business (Default)
Primary	At least one must be Primary
Use For	Select one or all that apply
Visibility	Required
Comments	Optional

#### Instant Messenger

Instant I	Messenger	
User Name	*	
Provider	* select one	*
Type	* Business	
Primary		
Use For	(empty)	
Visibility	Public	
Comments		

Field	Required/Optional
User Name	Required
Provider	Required
Туре	Business (Default)
Primary	At least one must be Primary
Use For	(empty)
Visibility	Required



	Comments	Optional
--	----------	----------

#### Web Address

Web Addr	ress	120
URL Address	*	
Type	Business	
Primary		
Use For	× Shipping	1
Visibility	Public	
Comments		

Field	Required/Optional
URL Address	Required
Туре	Business (Default)
Primary	At least one must be Primary
Use For	Select one or all that apply
Visibility	Required
Comments	Optional

#### Change Settlement Bank Accounts

Select the icon with this task.

Change Settlement Bank Accounts

below you will find what information can be added or updated



Q Search		P 2
Change Settlement Bank Account		
Change Event Settlement Account Change for Quality Ribbons & Supplies Co created by T	est Test on 66/18/2018 Status Draft	
Supplier Quality Ribbons & Supplies Co.		
Settlement Bank Accounts Attachments		
Settlement Bank Accounts 0 items		0.
Account Information	Account Details	Intermediary Bank Accounts

We are going to select the	(+)	icon in order to insert a Settlement Bank Ac	count.
----------------------------	-----	--	--------

Settlement A	Account	Information
--------------	---------	-------------

+	*Account Information	
Θ	Account Nickname	
	Account Type * Checking Savings	
	Supplier Connection Payment Types	=
	Payment Types	:=
	For Supplier Connections Only	

Field	Required/Optional
Account Nickname	Required
Account Type	One required
Supplier Connection Payment Types	Do Not Use



Payment Types	Select one or all that apply
For Supplier Connections Only Box	Do Not Use

#### Settlement Account Details

Account Details	
Country *	
	:=
Dank Morro	
ванк мате	
Branch Code	
Branch Name	
Bank Code	
Account Number	
Check Digit	
Name On Account	
Roll Number	
IBAN	
Bank Identification Code	
Bank Instructions	



Field	Required/Optional
Country	Required
Bank Name	Required
Branch Code	Optional
Branch Name	Optional
Bank Code	Required
Account Number	Required
Check Digit	Optional
Name on Account	Optional
Roll Number	Optional
IBAN	Optional
Bank Identification Code	Optional
Bank Instructions	Optional

#### Change Alternate Names

Select the icon	Change Alternate Names	below you will find what information can be updated with this
task.		

Select the icon in order to insert a new Alternate Name.



Field	Required/Optional
Name	Required
Usage	Select 1099 MISC Recipient and any other that may apply

#### Manage Attachments

Select the icon Manage Attachments below you will find what information can be updated with this task.



You will only have the ability to use the upload task to include additional attachments by selecting the

icon which will open your local file location to allow you to select the files you want to upload.



💿 Open				×
← → ~ ↑ 🕇 > Th	is PC > Downloads	v Ç	Search Downloads	م
Organize 👻 New fold	er			
Quick access Quick access Quick access Concerning This PC Concerning Dobjects Desktop Documents Documents Documents Documents Unders Pictures Videos Windows7_OS (C:)	Name	Date 6/7/2018 10:09 AM	Type Adobe Acrobat D	Size 26 KI
Network	٢			>
File n	ame: <sup>[*</sup> Enter Time Send Back Alert SS_0" "OriginalDataWithErrors (6)" "CMSD San	dbox_Put_Job_Profile" ' ∨	All Files Open Ca	∼ ancel

Once selected, click **Open** and the file will show on the Manage Attachments page along with a brief description of the file...

ŵ	Q Search
Μ	anage Attachments
Supp	Dier Quality Ribbons & Supplies Co. folioxml_s_hyatt197733746.pdf Comment Bank Info or W9
	Att.txt Uploaded by Test Test Comment

If necessary, you may add more files by repeating the Manage Attachment steps.



#### View

#### **Contact Information**

Select the icon below you will find what information can be viewed with this task.

Q Seat						¢ 📾 🤇
Contact Information						81 🐨
Pending Changes Gentact Differentice Change fo Phone I Tomin	examined by Treat and Bd/186/2019					日本日に
Piece Notiber	Phase Type	Colonante	Usege		Visikity	
+1:216-579-6201	Lauffine	turas.	Surren (Forwy) http:/		Faint	*
+1216-079-0898	***		Lanes Eing		Pulir	
Address 1 Im-						日本日に
Addmos	Unge	Vability		Effective Date	Address Reference ID	
2199 Communica Ra Citrustanii, Olin 44112 United Thates of Annatical Bertaile 1	Restored (Provery) Mailing Resto To	Pain		31/01/1998	ADDESL OF TOPOCE & Frank	
£2						
Erial Trees						日本日に

#### Settlement Bank Accounts

Select the icon Settlement Bank Accounts below you will find what information can be viewed with this task.

Q Search								ǰ 🖯	C
Settlement Bank	Accounts							0	6
Settlement Bank Account 1 Item								日本	8.7
Account Nickname	Bank Name	Account Type	Account Number	Supplier Connection Payment Types	Payment Types	For Supplier Connections Only	Prenate Status	Inactive	
Example	BolA	Checking		Direct Deposit EFT	Direct Deposit EFT		None	No	*
ě.									8



#### Alternate Names

Select the icon	Alternate Names	below you will find what information can be viewed with this
task.		

Alterna	te Names			đ
Primary N	ame	Alternate Names	ten -	0 = 0
rimary Name	Quality Ribbons & Supplies Co.	Name	Usage	
sage	Alternate Supplier Connection Doing Business As	testl	1099 MISC Recipient	
	EDI Integration Name	- C :		()
	Integration Name Matching			
	Purchase Order Name			



## Invoices and Payments Application

Purpose:	To provide instructions for viewing and searching most recent invoices and payments.
How to Access:	Log into the Supplier Self Service Portal and click <b>Invoices &amp; Payments</b> on your under the Applications section of the home page.
Audience:	CMSD Approved Suppliers
Helpful Hints:	Clicking on the blue text on any screen will return additional information.
Procedure:	Follow the steps below to view and search invoices and payments.

#### **Invoices and Payments**

**Invoices and Payments** can be accessed from your Supplier Self Service Portal home page. This application allows you to view the details for **most recent payments** and **most recent invoices**.

Q Search		¢	e	0
	Welcome, S-004706 / test test			
	Ansame   2 Harrs     Supplier Self-Service Web page   Disc being horn yoo lights of desched to be reduced to the Lights   Supplier Self-Service Web page   Disc being horn yoo lights of desched to be reduced to the Lights   Supplier Self-Service web Page   Supplier Self-Service web Page   Disc being horn yoo lights of desched to the supplier Self-Service web Page   Disc being horn yoo lights of desched to the supplier Self-Service web Page   Disc being horn yoo lights of desched to the supplier Self-Service Web page   Supplier FAQ Link   Disc being horn yoo lights of desched to the supplier F.   Supplier FAQ Link   Supplier FAQ Link   Disc being horn yoo lights of desched to the supplier F.   Supplier FAQ Link   Supplier FA			
	Go to to today			
	E 2010 Tables, to A. 7 and a second s			



#### Most Recent Payments

**Most Recent Payments** details include payment amount, payment date, transaction reference, and the number of invoices included in the payment while

Payment	View	Payment Amount	Currency	Payment Date	Transaction Reference	Invoices
Supplier Payment Contract & Commercial Customer Id: 1065558DET: 02/23/2018	View	17.82	USD	02/23/2018		1
Supplier Payment Contract & Commercial Customer Id: 1065558DET: 02/08/2018	View	356.76	USD	02/08/2018	1009967 (Check)	5
Supplier Payment: Contract & Commercial Customer Id: 1065558DET: 02/01/2018	View	909.78	USD	02/01/2018	1009593 (Check)	3
Supplier Payment: Contract & Commercial Customer Id: 1065558DET: 01/25/2018	View	11.78	USD	01/25/2018	1009125 (Check)	1

View More Details...

Clicking **View More Details** (in blue above) in the bottom left corner of Most Recent Payments will allow you to perform detailed searches using the selection fields below. This option allows customized searches to fit your needs.



Find Payments	s for Supplier Co	ntact	
Payment Date On or After Payment Date On or Before	MM / DD / YYYY €		
Payment Types Payment Status			Indicates availability of a search menu. See search options in the table below.
Payment Currency Payment Amount Equal To Payment Amount Greater Than	0		
Payment Amount Greater Han Payment Amount Less Than Supplier Reference Number	0		
Transaction Reference		1	

a	_	
٠	-	•
1		

Search menu options:

Selection Options	Options
Payment Types	Cash, Check, Credit Card, Debit Card, Direct Debit, Direct Deposit, EFT, Manual, Wire
Payment Status	Approved, Awaiting Payment Acknowledgement, Awaiting Settlement, Canceled, Complete, Draft, Escheated, In Progress, Payment Received, Rejected, Returned, Stopped, Unapplied
Payment Currency	Generally USD but other currency selections are available

Clicking **View** in the second column of the Most Recent Payments table returns payment details for each invoice included in the payment. The example below is the results of clicking **View** for the payment in the amount of \$356.76 which includes five invoices.



	л						Ç 🔒 🌔
View Pa	yment for Supplie	r Contact					0 7
Supplier Payment	Supplier Payment, Staples, Contract & C	Commercial Customer Id. 1065558DET. 02/08/2018	Status Complete Reconciliation Stat	ut Unieconciled			
<ul> <li>Paymer</li> </ul>	pt Information			<ul> <li>Payment D</li> </ul>	etail		
Company	Cleveland Metropolitan School District			Bank Account	Key Bark - Accounts Paysble Checking 3688		
Payee	Staples Contract & Commercial Oustom	er Id. 1065558DET		Payment Type	Check		
Payment Date	02/08/2018			Transaction Reference	1009967		
	377.57						
Payment Amount	300.70						
Payment Amount Currency	USD						
Payment Amount Currency Memo	USD (emuty)						
Payment Amount Currency Memo Invoices Paid 1111	USD (ensety)						0∦ ≠ 06 ⊡ r,
Payment Annount Currency Memo Invoices Paid 1111 Invoice	USD (Innutly) (Innutly) Innutly Innutly Date:	Supplie's Invoice Number	Invoice Amount	Discount Due Date	Invoice Due Date	Discount Takes	· 문화 문화 문화 또 또 Payment Account
Payment Amount Currency Memo Invoices Paid 1 in Invoice Q,	USD ( (vmu/y) ann kmvice Date 02/58/2018	Supplier's Invoice Number 2040251428	Invoice Amount 19.19	Discount Due Date	Invoice Due Date 02/10/2018	Discourt Takes	Di ⊽ tile ⊡ v Payment Ansount 18:19
Payment Amount Currency Memo Invoices Paid 1 m Invoice Q, Q,	USD (mm/s)	Suppler's Invoice Number 3348281428 2368251429	Invoice Annual 18.19 602.15	Discourt Due Date	Invoice Due Date 03/10/2018 03/10/2018	Discourt Talem 0.00 0.00	Image: The construction of the construction
Payment Amount Currency Memo Invoices Paid 11 III Invoice Q. Q.	200 / 0 UED (mmyr) mwsrz 0206/2018 0206/2018 0206/2018	Suppler's Invice Number 2048/281428 2048/281429 2048/281429	Invoice Annual 18.19 602.15 (319.00)	Dacount Due Date	Invoice Due Date 02/10/2018 03/10/2018 03/10/2018	Discourt Telem 6.00 0.00 0.00	(1)      (1)     (1)     (1)     (1)
Payment Amount Currency Memo Invoices Paid () In Invoice Q, Q, Q,	200 / 0 UED (mmyr) amu 2020/2018 2020/2018 2020/2018 2020/2018	Supplier's Invoice Number           2048261542           2048261542           2048261542           2048261542           2048261542           2048261542           2048261542           2048261542           2048261542           2048261542           2048261542           2048261542           204826154	Instite Annual 13 19 602 15 (374 60) 22 43	Discount Due Date	Invoice Bue Bule 03/10/2018 03/10/2018 03/10/2018 03/10/2018	Discourt Taken 0.00 0.00 0.00 0.00	(1)      (1)
Parment Annual Durrency Memo Invoices Paid 1 in Invoice Q Q Q Q Q	228.49 (Incur)	Supplier's Invoice Number           2568251428         2368251429           2368251429         3367231428           3367197014         3368197014	twoice Annual 19 19 602 19 (319 00) 22 43 3 19	Discount Due Date	Invoice Due Date           02/10/2018           02/10/2018           02/10/2018           02/10/2018           02/00/2018           02/00/2018           02/00/2018	Discount Taken 0.00 0.00 0.00 0.00	Image: The second se

▨束┉๓₽

Report features found in the top right of the report table allows you to export to Excel, filter data, create graphs, view/edit grid preferences, and toggle to full

As shown below, additional invoice details can be obtained by placing the cursor to the right of the magnifying glass and clicking on the yellow Twinkie (<sup>444</sup>). A pop-up window will display additional details.



N G search							
View Payment for	Supplier Contact						
Supplier Participation Participation Gra	ayılır Dontman E Gomman de Gumman de	ASSESSED T. BY COLORIS	enstelletien fintet – Reservit	4	1		
v Pa							
Actions	Supplier Invoice	Supplier Invoice: INV-10020128		RI (6)	nk - Announe Davabla Charking 1688		
Pause Favorite >	Supplier invoice	ouppiler involce. Inter rooz / 120					
Payment D	Invoice Number INV-1002912	8 Status Approved Match Status Matched Pay	ment Status Paid		08		
Payment D Payment A	Invoice Number INV-1002912	8 Status Approved Match Status Matched Pay	ment Status Paid		08 :		
Payment D Payment A Currency	Invoice Number INV-1002912	8 Status Approved Match Status Matched Payr ation	ment Status Paid	ence Information	<b>28</b> :		
Payment D Payment A Currency Memo	Invoice Number INV-1002912	8 Status Approved Match Status Matchee Pays ation Cleveland Menopolitan School District	ment Status Paid           Paid           V         Invoice Refere           Payment Terms	ence Information	D8		
Payment D Payment A Currency Memo	Invoice Number INV-1002912 <b>V Invoice Inform</b> Company Supplier	8 Status Approved March Status Matches Pay attion Creveland Meropolitan Solool District Stables Command & Commercial Costomer Is: 1865558DET	ment Status Paid  V Invoice Refere Payment Terms Supplier Document Received	ence Information Net 30 No	50 :		Fili ≡ di
Payment E Payment A Currency Memo Involces R	Invoice Number INV-1002912 V Invoice Inform Company Suppler Currency	8 Status Approved March Status Matches Pay attion Cleveland Meropolitan School District Stables Commercial Customer Id. 19655580ET USD	ment Status Pald  V Invoice Refere  Payment Terms  Supplier Document Received  Suppliers Invoice Number	ence Information Net 30 No 3361198718	35 		0]i ∓ di
Payment D Payment A Coursesy Memo Involces I Involces	Invoice Number INV-1002912 V Invoice Inform Company Suppler Currency Invoice Date	8 Status Approved March Stanus Matches Pay attion Cleveland Menopolitan School District Bragies Contract & Commercial Dustomer ist 10655580ET USD D1/d2/2018	ment Status Paid V Invoice Refere Payment Terms Supplier Document Received Suppliers Invoice Number Memo	Net 30 No 3361196718 Cleveland H.S. Digital Arta	96 Hier Due Date	Discount Taken	[]레 등 II] Payment Amou
Payment D Payment A Currency Memo Involces F Involce Q,	Invoice Number INV-1002112 V Invoice Inform Conseny Suppler Curreny Invoice Date Due Date	8 Status Approves Match Stanus Matches Pay attion Cleveland Menopolian School District Brajes Commercial Customer ist 10655680ET USD 01/02/2018 02/01/2018	ment Status Paid V Invoice Refere Payment Terms Supplier Document Received Suppliers Invoice Number Memo	Net 30 No 3361198718 Cleveland M.S. Digital Arta	96 nice Due Date 1/91/2018	Discount Taken	回》 家 助 Payment Amo
Payment D Payment A Currency Memo Involces F Involce Q, Q, Q,	Invoice Number INVO-1002112 V Invoice Inform Congany Suppler Curreny Invoice Date Dee Date Intercongany Invoice Annount	8 Status Approves March Stanus Matches Pay attion Cleveland Menopolitan School District Bragles Commercial Customer ist 10655580ET USD 01/d0/2015 02/01/2018 020	ment Status Pala V Invoice Refere Payment Terms Supplier Document Received Suppliers Invoice Number Memo	Net 30 No 3561198718 Cleveland H.S. Digital Arta	16 Die Die Volugela	Discount Taken 0.00 0.00	<ul> <li>[]]। इन्द्राधि</li> <li>Peyment Anno</li> <li>1</li> <li>7</li> </ul>
Payment D Payment A Currency Memo Involces I Involces I Q Q Q	Invoice Number INVO1002112 V Invoice Inform Constany Suppler Curreny Invoice Date Intercompany Invoice Annount	8 Status Approves March Stanus Matches Pay attion Cleveland Menopolian School District Brajeles Contract & Commercial Dustamer Id: 10655580ET USD 01/02/2018 02/01/2018 02/01/2018	ment Status Paid V Invoice Referen Payment Terms Supplier Document Beceived Supplier's Invoice Number Memo	Net 30 Ne 3367148718 Gewind K.S. Digital Arts	16 hee Due Date 1/01/2018 1/01/2018 1/01/2018	Discount Taken 0.00 0.00 0.00	团王 등 대 Payment Amou 1 7

Clicking directly on the magnifying glass will return the results shown below.

Q Search										P	Ð	5
View Supp	olier Inv	voice									01	6
Supplier Invoice Q	inv	oice Number INV-10029128	Status Approved									
<ul> <li>Invoice Inf</li> </ul>	formation			<ul> <li>Terr</li> </ul>	ns and Taxes		v	Invoice Reference Informa	tion			
Company Supplier Currency Invoice Date Invoice Received Date Total Invoice Amount Line Total Amount	Cleveland Me Staples Conti USD 01/02/2018 (empty) 7.75 7.75	ropolitan School Diatrict act & Commercial Costorner M 1	NESSECT	Payment Ten Due Date Reference Ty Reference Na Tax Option Default Tax C	ms Net 30 02/01/2018 pe (cmoty) mber (cmoty) (empty) dee (cmoty)		Ship-	6 Addens 0 1111 Gugeror An America Iers Isrvaice Number 205/1195718	etur E Sunto 1800 Cleveland, CH 4411	14 United States	a of	
1.hen										01 7	₹ dh 🖽	J.
Company		item	item Description	Supplier Item Identifier	Related Purchase Item	Purchase Order Line	Spend Category	Ship To Address	Ship To Contact		Quantit	
Cleveland Metropolita District	m School		item # 842595 boxder Trim			PO-10006050 - Live 5	519SC Other General Supplies	9 1440 Lokeside Avenue Develand, OH 44114 United States of America			1	4 
4												

Line item detail can be displayed by clicking directly on the **blue text** under Purchase Order Line (see above). The results are shown below.



View Go	ods Order Line					0I 😁
Goods Order Live Line Putchase Order Suppler Item Spend Category Tax Applicability	Q, 5 PO-1056455 Btapler Commercial Customer (d: 10655580ET (impro) SISSE Other Stenews) Supplers (impro)					
Tax Code	rability					
Ouanity Unit of Measure Unit Cost Estended Amount Currency Prepaid Ship-To Address Ship-To Contact	1 . Budle 1439 UID © 1442 Lakester Avenue Daveland, Dir 44114 United States of America (immor)					
Receipts Receipts 1 m Receipt	Invoices. m	Quantity Received	Received UOM	Quantity	이nsered VOM	∞ () <i>.</i> °
REC-0020296	fur P0-10006050	1	lock	Total:	t Bundir	

#### Most Recent Invoices

This report provides the list of your most recent invoices. Details for most recent invoices include invoice: number, amount, due date, status and payment status.

roice	Supplier Reference Number	Total Invoice Amount	Currency	Due Date	Invoice Status	Payment Status
vV-10035972	TEST001	267.91	USD	07/11/2018	In Progress	Unpaid
NV-10035877		0.00	USD	03/11/2018	Canceled	
NV-10035879	3368334953	17.82	USD	03/11/2019	Approved	Paid
NV-10035596	3368261429	602.15	USD	03/10/2018	Approved	Paid
NV-10035588	3368261428	.19.19	USD	03/10/2018	Approved	Paid
NV-10035611	3367231078	(319.00)	USD	03/10/2018	Approved	Paid
NV-10035364	3368197014	31.99	USD	03/09/2018	Approved	Paid
INV-10035365	3368197015	22.43	USD	03/09/2018	Approved	Paid
INV-10035366	3368197016	73.98	USD	03/09/2018	Approved	Unpaid
INV-10034226	2366276847	110.79	USD	03/02/2018	Approved	Paid

To see the details related to a given invoice, click on the invoice number (in blue text) in the column titled Invoice. A sample of the results is shown below.



View Supplier In	voice									E	1 6
Supplier Invoice Q I	nvoice Number INV-10025970 Sta	itus Draft									
<ul> <li>Invoice Information</li> </ul>	n			<ul> <li>Terms a</li> </ul>	nd Taxes		<ul> <li>Invoice Refe</li> </ul>	rence Information			
Company Cleveland I	Purplier Invoice       e     Q     Invoice Number     NUL100000000     Status     Death       Cention Colspan="2">Control Colspan="2"       Control Colspan="2"			Payment Terms	Net 30		Ship-To Address	In 1111 Superior Avenue E Sur America	te 1800 Cleveland, OH 44114	United States of	
Supplier Office Dep	t Acct, 10798088			Due Date	07/11/2018		Supplier's Invoice Number	6878886			
Currency USD				Reference Type	(empty)						
Invoice Date 06/11/201				Reference Namber	(empty)						
Invoice Received Date (+mpty)				Tax Option	(PTT(UY)						
lotal Invoice Amount 30.00				Detailit Tax Code	(empty)						
Line Total Amount 30.00											
1 ites										0l ∓ da	1 🗇 1'
Company	ltem	item Description	Supplier Item Identifier	Related Purchase Item	Purchase Order Line	Spend Category	Ship-To Address	Ship-To Contact	Quantity	Unit of Measure	
Develand Metropolitan School District		Delvery Charge			PU-UNI3821 - Line 1	5175C Office Supplies	1111 Superior Avenue E Suite 1800 Disveland, OH 44114 United States of America		1	Fach	*
4											•

To review the line item details, click the blue text under Purchase Order Line. See example below.

View Go	ods Order Line					01 😨
Goods Order Line	a.					
Line	1					
Purchase Order	P0-0503821					
Supplier	Office Depot - Acct. 10798088					
there	(empty)					
Spend Category	ST2SC Office Supples					
Tax Applicability	(ampty)					
Tax Code	(ematy)					
Tax Recove	rability					
Quantity	1					
Unit of Measure	Each					
Unit Cost	30.00					
Extended Amount	50.00					
Currency	uso					
Prepaid						
Ship-To Address	1111 Superior Avenue E Suite 1800 Cleveland, OH 44114 United St	ates of America				
Ship-To Contact	(411472)					
Barrier						
necepts	Invoice					
Receipts 1 im						⊡ ⊽ sh ⊡ ."
Receipt		Quantity Received	leceived UDM		Quantity Ordered UOM	
LEGACY-SODE	21-1 for PO-0503821	1.	Each		1 Eech	8
				Total	1	-
1						× 11

If you don't see the invoice you want, click **View More Details** on the bottom left of the report to open the **Find Invoices for Supplier Contract** box. This feature allows you to search for



invoices based on due dates, invoice number, supplier reference number, and invoice or payment status.

			9 f	글	0
or Supplier Conta	ţ				
85/19/2018 🗐					
MW/00/YYYY 🗒					
Ξ					
10					
đ					]
	or Supplier Contac	or Supplier Contact	or Supplier Contact	Or Supplier Contact         0/ 19/2018         W/00/YWY         IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	Or Supplier Contact         0/ 19/2018         W/00/YWY         IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII

Enter your search criteria and click to continue the search or to discontinue the search. Not all fields are required to complete a search. You can customize the search based on your needs.

Search menu options:

Selection Criteria	Options
Invoice Status	Approved, Canceled, Denied, Draft, Incomplete, In Progress
Payment Status	Paid, Partially Paid, Unpaid

#### Find Purchase Orders

This feature allows you to search for a purchase order based on date or purchase order number. To perform a search enter the date range or purchase order number and click to continue or to stop the search.



ind Purchase	Orders for Supplier Contact	
ocument Date Os or After	05/19/2018 🗐	
ocument Date On or Before	w/20//YYY 哲	
urchase Grider		

Below is an example of the results for a search based on date.

Q Search			P 🕹 🗅
← Purchase Orders			0 🖶
76 dana			01 ≅ 01₀ ⊡ v <sup>3</sup>
Purchase Order	Document Date	Status	Amount
PO 10029650	02/05/2018	lasued	307.36
P0-10009624	02/05/2018	insued	1,265.04
P0-10059626	02/05/2018	Issued	1,734.60
PO-10009627	02/05/2018	issued -	1,212.86
PO-10009628	02/05/2018	latured	4746.65
PG-10001643	02/05/2018	issued	325.83
PG-10009614	02/03/2018	issued	269.28
P0-10009612	02/03/2018	koued	613.95
PG-10009660	02/02/2018	issued	625.44
PG-1000H02	02/02/2018	lapsed (	282.66
P0-10004606	02/02/2018	lasurd .	1,259 51
P0-10009543	02/02/2018	issued	193.76
P0-10009577	02/02/2018	issued	1,430.79
PG-10005546	02/02/2018	lasued	\$7.06
P0-10009549	92/92/2018	looued	209.32
8.			19 C

To view the purchase order details, click the purchase order number (in blue text). Below is an example of the results.



Q Search											Ĺ	P 🔮 (
View Purc	cha	se Order										01 10
Purchase Grder PO	> 1000%	50 PO Number PO-10001650										
Summary	y					<ul> <li>Contact Inf</li> </ul>	formation					
Company Co	Seveland	Metropolitan School District				Issue Option	XML Acto					
Ocument Date 02	2/05/20	8				Buyer	Lyncolys Park	a (501389)				
Supplier Or	office Dep	ot - Acct. 10798085				Buyer Email	E Lyncolys R	Parks@clevelandmetroschools.org	i.			
ayment Terms I La	let 30					Bill-To Contact	Lyncolys Park	s (921389)				
lue Date ():	kruzhj					Bill-To Contact Detail	Contact Detail Lancooya Packs (S01389)					
lumency US	/SD					Bill-To Contact Email	Lyncolys I	Parks@clevelandmetroschools.org				
Fotal Antiount 30	07.38					Billing Address	0 1111 Supe	erior Avenue E				
Requisition Type II In	legular					Ship-To Contact	Nids L Mendo	32.6 (4993064)				
						Ship-To Contact Detail	Nida L Merido	sga (499(384)				
						Ship-To Contact Email	R Nida mer	doza@clevelandmetroschools.org	6			
						Shipping Address	1701 Cest	ie Avenue Dieveland, 0H 44113 Ur	ited States of America			
tema 1 item											3	3  ∠ ໜ ⊡ '.
Gooda Order Line	Line	News and Category	Supplier Item Identifier	Tan	Tax Recoverability	Guantity		Cost	Delivery	Retention	Prepaid	Ship To Addre
Q	1	ben .	500609	Tax Applicability		Ontered 2 Received		Unit of Measure Each	Due Date Lead Time			© 1701 Cast = OH 44113 Uni America
		Item Description Del[7M] M11XX Return Program Black Toner Cartridge Spend Category S12SC Office Supplies		Tas Code		3 Involced D		Unit Cost 153.49 Extended Ampunt 207.38				
												-
4												



## POs and Catalogs Application

Purpose:	To provide instructions for viewing and searching most recent invoices and payments.
How to Access:	Log into the Supplier Self Service Portal and click <b>POs and Catalogs</b> under the Applications section of the home page.
Audience:	CMSD Approved Suppliers
Helpful Hints:	Clicking on the blue text on any screen will return additional information.
Procedure:	Follow the steps below to view and search PO and catalog items.



The **POs and Catalogs** application allows you to view your most recent purchase orders, view uninvoiced POs, and find purchase orders. Details include purchase order status, date, and amount, number of invoiced and partially invoiced POs, and amount of uninvoiced POs.



Q Search								\$° 6	8 C
POs and Ca	talogs								
Most Recent Purchas	se Orders		0	Uninvoiced POs		۲	Purchase Order		
Purchase Order	Document Date	Status	Amount	40	66		Find Purchase Orders		
PO-12009968	02/14/2018	issued .	7,004.71	Partially Invoiced	Uninvoiced				
PG-10009908	02/09/2018	becasi	127.09						
PG-10009941	62/09/2018	losued	89.78						
PD-10009911	02/09/2018	laued .	355.89	63,70	8.25				
PD-10009901	82/06/2018	Issued	115.09	Uninvoice	d Amount				
PO-10009890	02/08/2018	Issued.	508.71						
PO-10009876	02/06/2018	Issued .	172.47	Currency USD					
PO-10009833	02/06/2018	issued	431.42						
PO-10009850	02/06/2018	Issued	135.70						
PO-10009851	02/08/2018	issued.	113.95						

Viewing information for POs and Catalogs is very similar to viewing information for Invoices and Payments.

#### Most Recent Purchase Orders

To view a purchase order, click the PO number in the first column.

Purchase Order	Document Date	Status	Amoun
PO-10009968	02/14/2018	Issued	7,004.71
PO-10009906	02/09/2018	Issued	127.09
PO-10009941	02/09/2018	Issued	89.78
PO-10009911	02/09/2018	Issued	356.89
PO-10009901	02/09/2018	Issued	118.09
PO-10009890	02/08/2018	Issued	508.71
PO-10009876	02/08/2018	Issued	172.47
PO-10009833	02/08/2018	Issued	431.40
PO-10009850	02/08/2018	Issued	135.70
PO-10009851	02/08/2018	Issued	113.95



#### A sample report is shown below.

Q	Gewich									4	6	1
View	Purcha	se Order									GI	6
urchase Ord	er PO-100091	at PO Number PO-1000H941										
- Sum	mary					<ul> <li>Contact Inform</li> </ul>	nation					
propany	Cleveland	Metropolitan School Diatrict				Issue Option XML	Auto					
xument Da	u 02/09/20	18				Buyer Lines	olys Perks (501389)					
ipplier	Office Des	ut - Autt. 10798088				Buyer Ernall 🖂 L	proolys. Parka@clevelandmetroschools.org					
syment Terr	rs Net 30					Bill-To Contact Lynor	olya Parka (501389)					
ue Date	(etteria)					Bill-To Contact Detail Lynor	olyk Parks (501589)					
rrency	1050					Bill-To Contact Email.	proofys Parka@clevelandmetroschools.org					
al Arrount	89.78					Billing Address 🗧 1	111 Superior Avenue E					
pulsition T	pe Regular					Ship-To Contact Justi	ne R Lance (426918)					
						Ship-To Contact Detail Just	ine Lance (426918)					
						Ship-To Contact Email 🛛 📄	iuntine lance@clevelandmetroschools.org					
						Shipping Address	575 West 130th Street Cleveland, DH 4411	United States of America				
ins then										E		i
Gooda Order Line	Line	tem and Category	Supplier Item Identifier	Tax	Tax Recoverability	Quantity	Cost	Delivery	Retention	Prepaid	Ship-To Addre	
q,	1	Rem.	147191	Tax Applicativity		Ordered 3 Received	Unit of Measure Roll	Due Date			© 3575 Wes CH 44511 Ch Americe	
		HP Large-Format Film Roll, 36 x 300, 4 7 ml, White Spend Category 51250 Office Supplies				Avoiced 0	44.09 Estended Amount 89.76					

If the purchase order you seek is not listed, click **View More Details** to launch the search box. To search box below should appear. You may search by date or by PO number.

Find Purchase Orders for Supplier Contact       Decomert Date On or After       biocontert Date On or After       biocontert Date On or Metre       Biocontert Date On or Metre		
Decument Date On or After 25/19/2018  Decument Date On or Betrow 18//00/7YYY  Putchase Onter		
Cancel		

To perform a search, enter your search criteria and click to continue or to stop the search.

**Helpful Hint:** You must make sure to enter the correct date range when searching for a specific purchase order, otherwise you will not get results.



Below is an example of the search criteria for PO 10009560. Please note the date fields have been populated with a date range that coincides with the purchase order date.

Q Search		Ç	P	0
Find Purchas	e Orders for Supplier Contact			
Document Date On or After Document Date On or Defore Purchase Oxfer	02/01/2018			

Following is the result. Click the PO number (in blue) to see the details.

Q Search			🖗 🔮 🗅
← Purchase Orders			0 6
Tan			@ ∓00 @ .'
Purchase Order	Document Date	Status	Amount
R010005660	02/02/2016	issued	625.44 ×
1			•

Following is a sample of the report you will see. You can scroll up and down (right side of the report) or left and right (bottom of the report) to view the full report. You can also export to Excel.



View P	urcha	se Order									01 🔁
Putchase Order	P0-100095	60 PO Number PO-10009560	2								
🗸 Summ	nary					<ul> <li>Contact Inf</li> </ul>	formation				
Company	Cleveland	Metropolitan School District				Issue Option	XXVL Auto				
Document Date	02/02/20	18				Buyer	Lyncoly# Parks (501389)				
Supplier	Office De	pot + Acct. 10798088				Buyer Email	🔄 Lyncolya Parka @cievelandmetroschool	a org			
Payment Terms	Net 30					Bill-To Contact	Lyncolye Parks (501389)				
Due Date	(((1)))					Bill-To Contact Detail	Lyncolys Parks (501289)				
Currency	050					Bill-To Contact Email	🗄 Lancoiya Parkağıclevelandmetroachool	a org			
Total Amount	675.44					Billing Address	0 1111 Superior Avenue E				
Requisition Type	Regular					Ship-To Contact	Elizabeth Williamson (422881)				
						Ship-To Cornact Detail	Elizabeth Williamson (422881)				
						Ship-To Contact Email	E Elzabeth williamson@cievelandmetvos	chools org-			
						Shipping Address	9 9300 Duncy Avenue Cleveland OH 441	Of Deced States of America			
Items 31 Items						1					ោ⊽សកែខ
Ganda			Consilier								
Order Line	Line	tem and Category	hem Identifier	Tas	Tas Recoverability	Quantity	Cost	Delivery	Retention	Prepaid	Ship-To Addre
Q	1	llen.	416161	Tax Applicability		Ordered	Unit of Measure	Due Date			9300 Qum *
						1	Each	1004700			America
		item Description		Tax Code		Received	Unit Cost	Ledu Fore			
		Cuisinart PrecisionChef Bowl Digital		in case			36.39				
		Machen scele.				Invoiced	Extended Amount				
		Spend Category S11SC Classroom Supplies					26:39				
Q.	1	Item	853197	Tax Adelicability		Ordered	Unit of Measure	Due Date			0 9300 Quin
						2	Each				QH 44105 UN America
						Berginst		Lead Time			

#### **Uninvoiced POs**

This feature allows you to view partially invoiced POs and uninvoiced POs while providing the uninvoiced amount. Clicking on any of the blue text allows you to: view details, export to Excel, or export to a PDF.





To illustrate this functionality, we will use the **Partially Invoiced** field. The example below shows the menu options for Uninvoiced Amount and the resulting reports that are generated.

Uninvoiced POs	ŝ
Partially Invoi Export to Excel (All Columns) Export to PDF	
7,758.59 Uninvoiced Amount	
Currency USD	

**Helpful Hint:** While the menu options are different (View Details, Export to Excel, Export to a PDF) for Partially Invoiced, the resulting reports will return the same information (PO#, document date, status, uninvoiced amount, and currency).

#### Sample Results: View Details

As shown in the upper right corner of the following report, tools are available to allow you to customize the report to fit your needs. Options include print, export to excel, filter, and create graphs.

#### View Details

To view the details, click any of the blue fields as shown above to pull up the menu. Click View Details on the menu to display the detailed report (see example on the next page).



4 items				
Purchase Order	Document Date	Status	Uninvoiced Amount Cu	urrency
PO-0524094	05/10/2017	Issued	36.99	USD
PO-0524759	05/16/2017	Issued	29.98	USD
P0-0525142	05/18/2017	issued	559.94	USD
PO-0525153	05/18/2017	Issued	72.15	USD
P0-0526126	05/25/2017	Issued	2,212.19	USD
P0-0526342	05/26/2017	Issued	614.70	USD
PO-0527988	05/31/2017	Issued	1,799.90	USD
PO-10001647	08/16/2017	Issued	20.99	USD
P0-10002020	08/24/2017	Issued	35.96	USD
PO-10005646	11/02/2017	Issued	13.74	USD
P0-10006050	1006050 11/13/2017 Issued		126.30	USD
P0-10007939	12/21/2017	Issued	271.00	USD
PO-10009064	01/25/2018	Issued	23.29	USD
PO-10009393	01/31/2018	Issued	396.61	USD

#### Export to Excel

To export a file to Excel, click the icon in the upper right corner of the data table (see above) or click Export to Excel (All Columns) as shown on the previous page. The Excel file will appear in the bottom left corner of the screen. Double click the file to open it.

#### Sample Results: Export to Excel

If you want to edit the Excel file, click Enable Editing once the file has downloaded. See example on the next page.



	÷	5-0			Details_View (	1) [Protected View] - Excel
File		Home Insert Page La	yout Formulas Data R	eview View Templates	${ig Q}$ Tell me what you want to d	lo
Û	PRO	DTECTED VIEW Be careful—file	es from the Internet can contain v	iruses. Unless you need to edit, i	t's safer to stay in Protected View	. Enable Editing
B32		• I X V	fx			
		A	В	С	D	E
<i>»</i>	1	Purchase Order	Document Date	Status	Uninvoiced Amount	Currency
	2	PO-0524094	5/10/2017	Issued	36.99	USD
ates	3	PO-0524759	5/16/2017	Issued	29.98	USD
d	4	PO-0525142	5/18/2017	Issued	559.94	USD
Ter	5	PO-0525153	5/18/2017	Issued	72.15	USD
S	6	PO-0526126	5/25/2017	Issued	2,212.19	USD
§	7	PO-0526342	5/26/2017	Issued	614.70	USD
ā	8	PO-0527988	5/31/2017	Issued	1,799.90	USD
۹	9	PO-10001647	8/16/2017	Issued	20.99	USD
es	10	PO-10002020	8/24/2017	Issued	35.96	USD
plat	11	PO-10005646	11/2/2017	Issued	13.74	USD
e B	12	PO-10006050	11/13/2017	Issued	126.30	USD
н Ч	13	PO-10007939	12/21/2017	Issued	271.00	USD
carc	14	PO-10009064	1/25/2018	Issued	23.29	USD
Š	15	PO-10009393	1/31/2018	Issued	396.61	USD

## Export to PDF

If you prefer to export the Partially Invoiced POs to a PDF file, choose the Export to PDF option.

Uninvoiced POs	දිටු
Partially Invoi Export to Excel (All Columns) Export to PDF	
7,758.59 Uninvoiced Amount	
Currency USD	

The resulting PDF report is shown on the next page.



#### Sample Results: Export to PDF

	Deta	10:48 AM 06/20/2018 Page 1 of 1		
Purchase Order	Document Date	Status	Uninvoiced Amount	Currency
PO-0524094	05/10/2017	Issued	36.99	USD
PO-0524759	05/16/2017	Issued	29.98	USD
PO-0525142	05/18/2017	Issued	559.94	USD
PO-0525153	05/18/2017	Issued	72.15	USD
PO-0526126	05/25/2017	Issued	2,212.19	USD
PO-0526342	05/26/2017	Issued	614.70	USD
PO-0527988	05/31/2017	Issued	1,799.90	USD
PO-10001647	08/16/2017	Issued	20.99	USD
PO-10002020	08/24/2017	Issued	35.96	USD
PO-10005646	11/02/2017	Issued	13.74	USD
PO-10006050	11/13/2017	Issued	126.30	USD
PO-10007939	12/21/2017	Issued	271.00	USD
PO-10009064	01/25/2018	Issued	23.29	USD
PO-10009393	01/31/2018	Issued	396.61	USD

**Helpful Hint:** The View Details, Export to Excel and Export to PDF menu options shown below for Partially Invoiced, can also be used to display additional information for Uninvoiced and Uninvoiced Amount.



Uninvoiced PUs			55
14 Partially Invoi	<u>View Details</u> Export to Excel (All Columns) Export to PDF	7 ninvoiced	
	7,758.59 Uninvoiced Amount		
Currency USD			

#### **Purchase Orders**

The Purchase Order option allows you to search for purchase orders by PO number and date. To activate the search, click **Find Purchase Orders**.

You will see the search criteria screen below. You can search by date range or by PO number.



V Q. Search	Ç 🖻 🥥
Find Purchase Orders for Supplier Contact	
Document Date On or After     05 / 20 / 20 / 8       Document Date On or Betwee     MM / D0 / YYYY	
Partaer Dier Cancel	

**Helpful Hint:** If you search by PO number, be sure to enter a valid date range. If the date range does not coincide with the date of the PO, your search by PO will fail.

#### Search by Date Range

To search by date, enter the dates for purchase orders you'd like to see. In the example below we used the following dates.

Document Date On or After	02/01/2018 🛱
Document Date On or Before	02/09/2018 🖬

Q Search	Ŷ	ł	0
Find Purchase Orders for Supplier Contact			
Document Date Din or After 02 / 01 / 2018 🛱			
Document Date On or Before 02//09/2018 💼			
Purchase Order			
OK Canoel			



Click continue or to stop the search. Clicking returned the results below. We see two POs that were issued within the specified period.

Q Search			🖓 🖻 🔷
← Purchase Orders			0 8
2 tens			데 흐에 면 ru
Purchase Order	Document Date	Status	Amount
PO-10009697	02/06/2018	lissued	160.43
P0-10009651	02/05/2018	Issued	602.15
(			þ

To view the purchase order details, click the Po number. We clicked the first PO on the list to generate the report below.



View Pu	urchase	e Order										Į	16
Purchase Order	PO-10009697	PO Number PO-10009697											
✓ Summ	ary					· Contact Info	ormation						
Concary	Caulant Us	generalizas Solunai Algenice				lotue Ontion	Dier						
Document Date	02/06/2018					Barr	Rancaka Trankia (200740)						
Supplier	Staples Cont	tract & Commercial Customer (d. 1065550	DET			Buyer Email	Ronishattembleßgiew	elandmetroschools pro					
Payment larms	Net 30					Bill-To Context	Rovisha Trambia (200350)						
Due Date	(ampty)					Bill-To Contact Detail	Ronisha Tremble (499059)						
Currency	USD					Bil-In Contact Estal	1. Ronisha tramble@class	elandmetroschools.org					
Total Amount	160.43					Billing Address	1111 Superior Avenue 1	t i					
Requisition Type	Həqilər					Ship-To Contact	Honsha Tremble (199359)						
						Ship-To Contact Detail	Rorisha Tremble (499359)	i.					
						Ship-To Contact Email	B Ronisha tremble@clev	elandmetroschoola.org					
						Shipping Address	P 5100 Bubbleh Avenue	Cleveland OH 44144 United	States of America				
2010 C												Di - 4	= 1
RCTG I term										1	11	638 ÷ 00	10 L.
Geods Order Line	Live it	tern and Calegory	Tas	Tax Recoverability	Quantity	Cest	Deli	inali	Retention	Prepaid	Ship-To Address	Ship-To Contact	
d		tem tem Decription form CS10015 Communication watch Daplies from # NUTRC2000 VFR Inter + CS1000 USB Speed Congony 11220 Office Supplee	Tex Aquituability Tax Code		Ordenel 2 Received 0 involved 0	Unit of Messure Each Unit Cast 25.29 Extended Amount 53.59	Dur	e Dute 1d Time			Vitt Reddyk Auma Clauland Ok 21 Li United Dates et Amerika	Romita Taentia (20155)	
đ	2	tem Man Deuclytion Maai 19 - 100 Brans Dynamic Oper Ju Onder Hendlahmer, Back (19031) Stellsten HDD, 190310 Deuceme Inter HDD, 190310 Deuceme Inter HDD, 190310 Genet Canagery 1904 Of Canagery	Tax Applicability Tex Code		Defend 13 Received 0 Inviced	Unit of Macoure Each Unit Cost 6/79 Enherded Amount 101.65	Der	e Date			9100 Doddub Avenue Claviend Or 4114 United States of America	Ronaha Tembis (49035)	

#### Search by Purchase Order

To reiterate, a search by purchase order requires both the purchase order number <u>and</u> a valid date range. If you choose a purchase order that was issued before or after the date range you enter, the search will not return valid results. Following are three search examples and the results.



#### Search by Purchase Order Number Only

In this example we use a valid PO number but did not change the default date range.

Q South	h 🖗	0
Find Purchase Orders for Supplier Contact		
Document Date Choir Alfenti     051/201/2018 ED       Document Date Choir Alfenti     W1/00/YYYY ED       Punchase Order     PO: 0000651		

While the PO number was valid, the date range was not (05/20/2018-MM/DD/YYYY). As a result, the purchase order search failed (see below).

Q Search			Ç 🗗 🜔
← Purchase Orders			₫ 🖶
Otans			0i ∓ u ⊟ .'
Purchase Order	Version Document Date No Data	Status	Amount

#### Search for a Specific PO within a Specific Date Range

In this example we will perform a search using a valid PO number (PO-10009651) and a valid date range (02/01/2018 - 02/10/2018).



W Q Seech	 Ç 🖻 🗘
Find Purchase Orders for Supplier Contact	
Document Date On ar Affer 201/01/12/18	
Purdaex Order PO10000101	
Carof Carof	

Because we used a valid search criteria, the purchase order search returned the PO we were looking for (see below).

Q Seech			ǰ 🖻 🔵
← Purchase Orders			0.0
1 her			0]i ∓ db (1) .''
Purchase Order	Document Date	Datus	Amount
PD-10009651	02/05/2018	insued	602.15 ····
¢			F

Clicking the PO number (in blue) allows us to view the PO details (see below).



<b>W</b> Q 544	à											¢	፼ 🔘
View Pu	irchas	se Order											01 🙃
Purchase Order	PG-100095	51 PO Number PO-10008651											
- Summary					<ul> <li>Contact Information</li> </ul>								
Company	Company Disveland Metropolitan School District				Issue Option	Pint							
Document Date: 02/05/2018					Buyer	Pauline Reid (49824	4						
Supplier	Staples Co	ntract & Commercial Customer Id. 100335	IDET			Buyer Email	El Paulmereidãole	evelandmentechools.org					
Payment Terms	Net 30					Bill To Contact Detail Faultine Reid							
Due Date	(amply)					Billing Address 0 1111 Euperior Avenue E							
Total Amount	452.18					Ship To Connect Detail Pauline Red							
						andheid yearses	V 1440 Lahas de A	verue Develant, DH 44114 UK	road states of America				
hems Shena													₩ IIn II ."
Geods Order Line	Lite	Item and Category	Ter	Tax Recoverability	Quantity	Cost		Delivery	Retention	Prepaid	Ship-To Address	Ship-To Contact	
٩	1	Nem Description Neme 2012/177 Dry anas markers fine black 12 pk Spend Entegory 51156: Cleannon Supplee	Tax Seplicability Tax Code		Colored 3 Received 4 Invested 8	Unit of Measure Docen Unit Clast 6.99 Estembed Ansaurt 55.92		Due Dans Land Time			14/0 Lakede Annue Cleviand Ow AT Lis United States of America		Å
Q	2	Nem Teem Description sevent11120 Pager Mana Legald pager Taipé Baerd Canegory 3113C Cleansoom Supplee	Tas Applicability Tas Code		Ordered 2 Received 2 Immpred 2	Unit of Measure Dozen Unit Gest 25.95 Eftended Amount 23.52		Dur Dan			9 1440 Lakestle Avenue Cleveland OH 40114 United States of America		

#### Search by Date Range Only

In most cases, date range searches are used for "open" searches. Open searches are used to identify all open purchase orders for a specific period of time. In this case, the date range used for the search will be: 02/01/2018-02/15/2018.

Q Seach	Ŷ	Ð	0
Find Purchase Orders for Supplier Contact			
Document Date On or After 02/01/2018			
Document Date On or Before 02./ 157,2018 🗊			
Purchase Order			
Of Daniel			



The search by date range (02/01/2018-02/15/2018) returned the results below.

Q Search			🔑 🖻 🧅
← Purchase Orders			0 8
23ems			0≣ ≅ nh ⊡ r'
Purchase Order	Document Date	Status	Amount
PO-10009697	02/06/2018	Issued	160.43 🔺
PG-1009651	02/05/2018	lasued	602.15
4			· · · · · · · · · · · · · · · · · · ·



## **Training Notes**





